

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

SUBMITTED BY

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1 INTRODUCTION

1.1 Overview

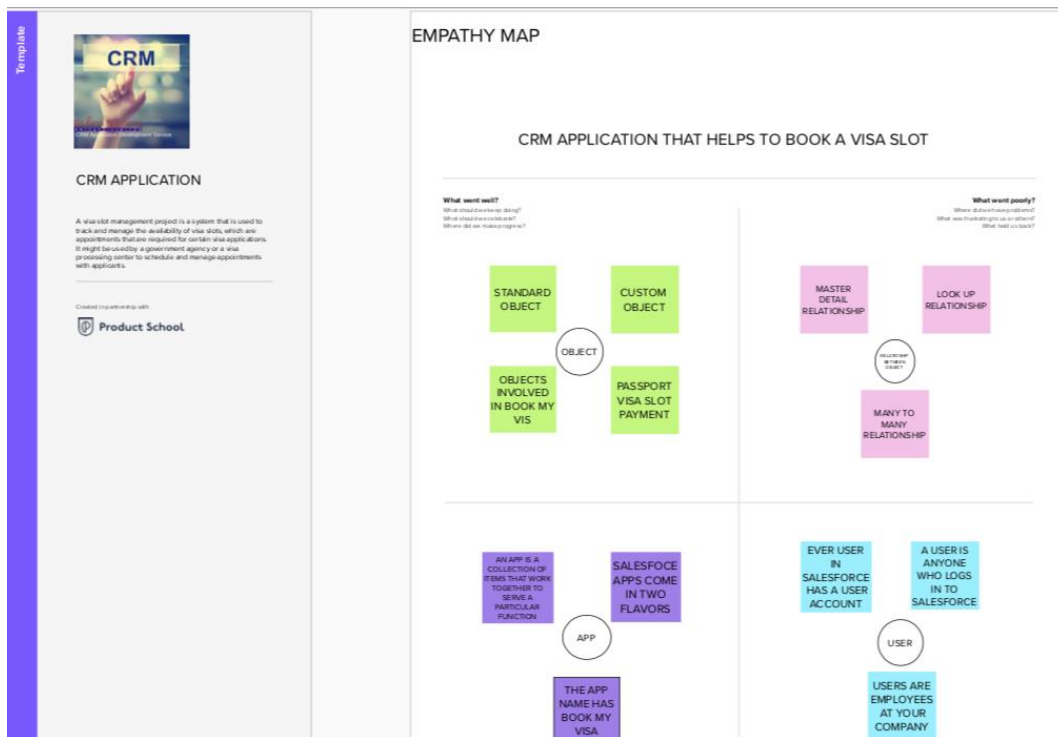
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointments with applicants.

1.2 Purpose

Saving the time of the customers who want to book it by using CRM application of booking a visa slot. Wandering for booking the visa slot and tracking can be reduce here. Reduce the paper filling as much the customer expecting. Ensuring the safely of the customers and panic of many verification.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

Person1 : Elamathi S

Person 2 : Jaihindd J

Person 3 : Jayanthi R

Person 4: Karthikeyan s



Brainstorm

CRM APPLICATION

10 minutes

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT



3 RESULT

3.1 Data Model:

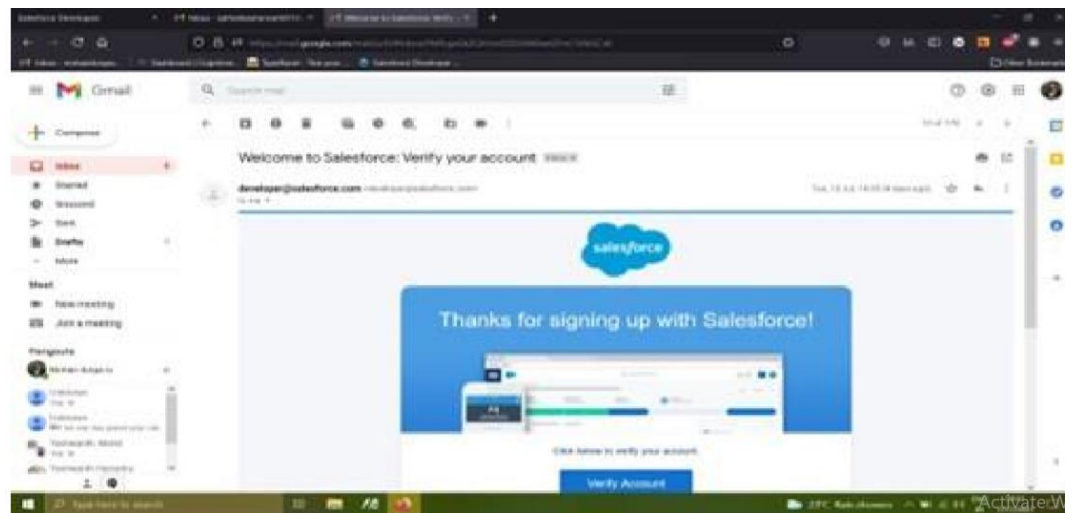
| Object name | Fields in the Object | |
|-------------|----------------------|-----------|
| obj1 | Field label | Data type |
| | Passport | Text |
| | Passport number | Text |
| | | |
| obj2 | Field label | Data type |
| | Contact Number | Number |
| | Permanent Address | Text |
| | | |

3.2 Activity & Screenshot

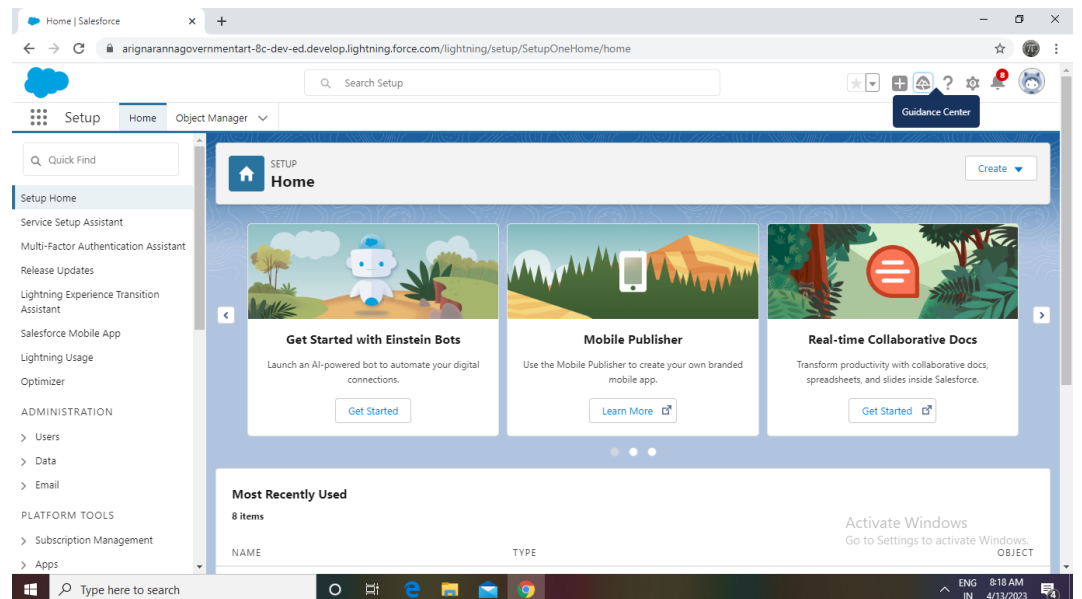
Milestone-1 : Creation of developer org

Activity-1

_Creating Developer Account



Login to Your Sales force Account

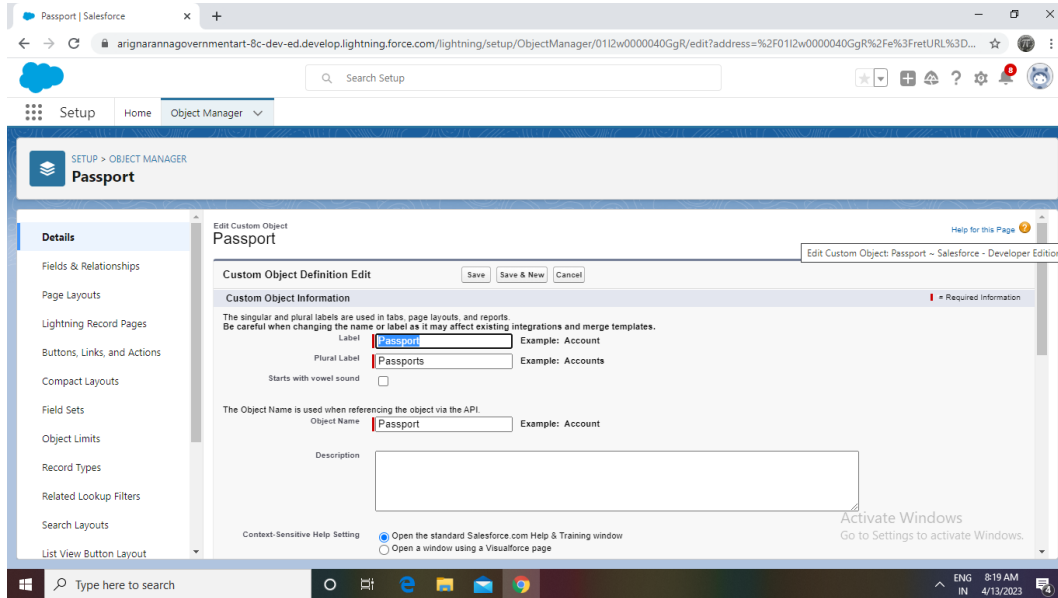


Milestone -2 : objects:

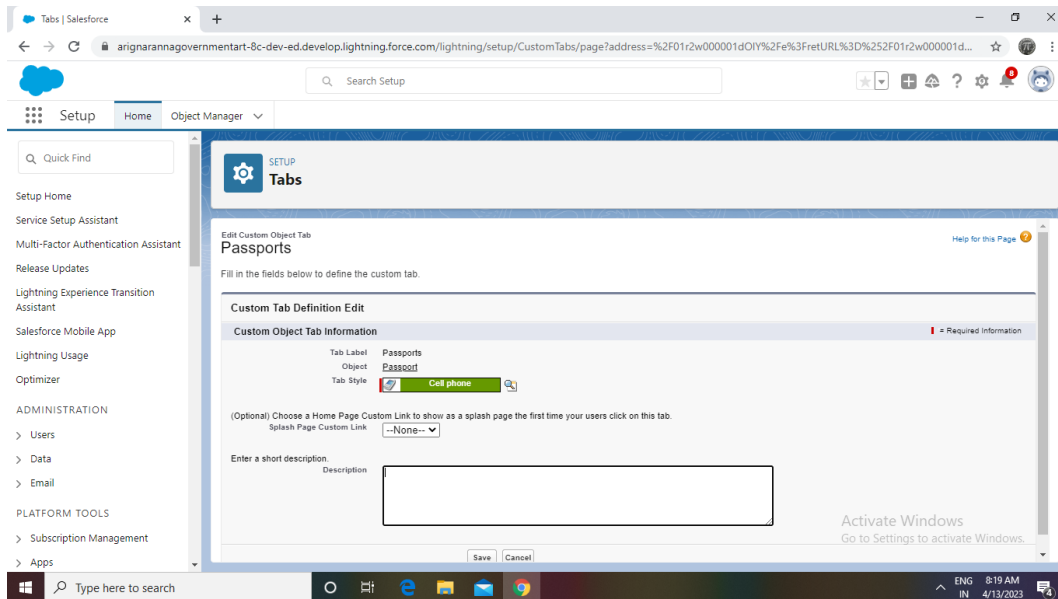
Activity: 1

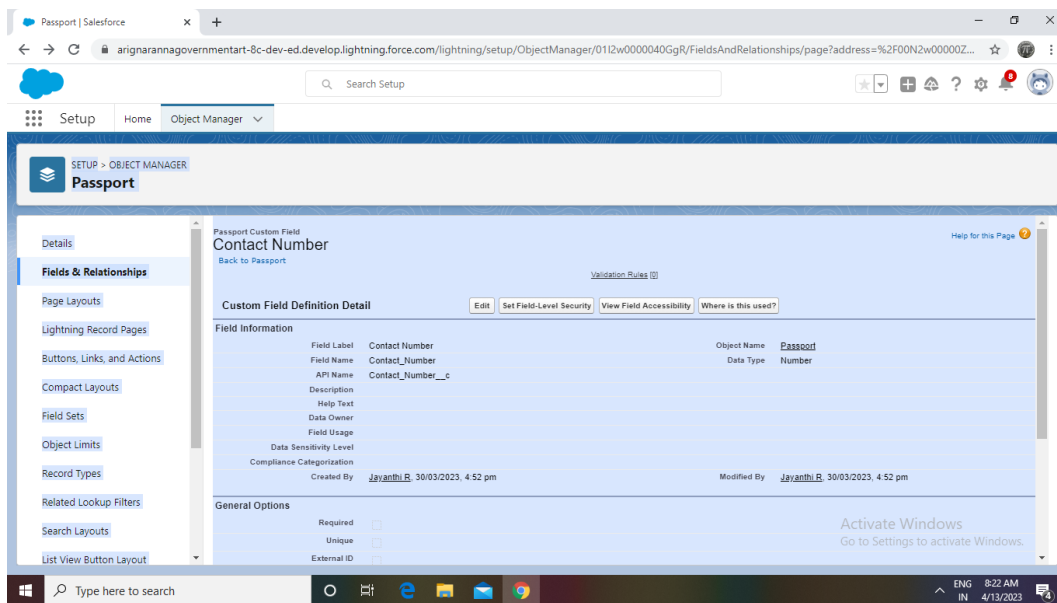
Creation of custom object: passport

- 1) Navigate to setup and select object manager
- 2) At the top of the right side there you can find create custom object
- 3) You will navigate to custom object definition edit where you have to give the object name



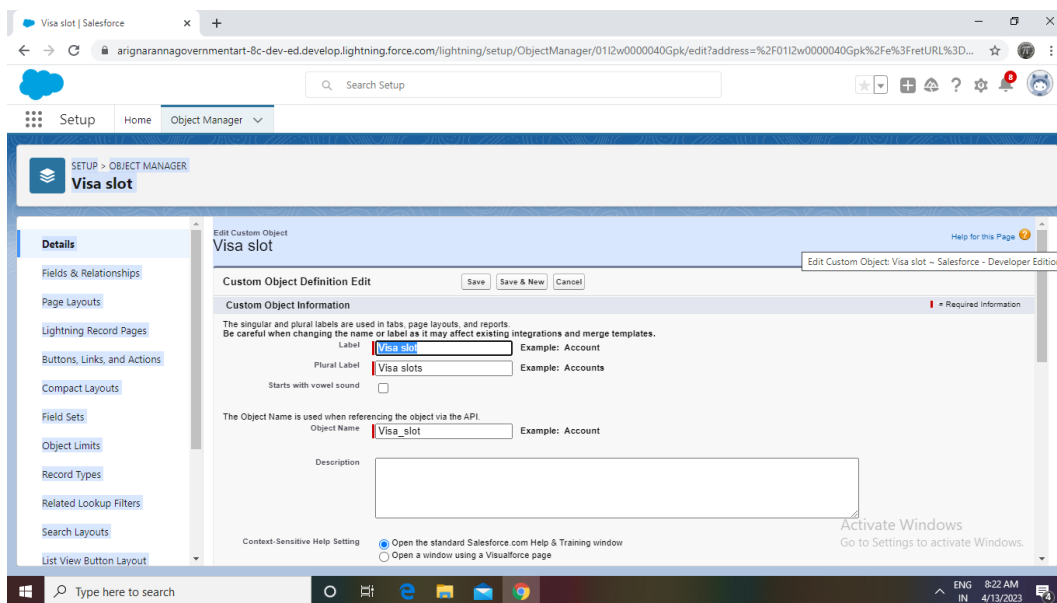
Then click on the next you will navigation to the new custom object





Milestone -3 : Relationship Between Objects:

Activity : Creation Of Relationship:



Setup | Salesforce

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

- Users
- Data
- Email

PLATFORM TOOLS

- Subscription Management
- Apps

SETUP Tabs

Edit Custom Object Tab

Visa slots

Fill in the fields below to define the custom tab.

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Visa slots

Object: Visa slot

Tab Style: Cell phone

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Save Cancel

Activate Windows
Go to Settings to activate Windows.

Setup | Salesforce

Search Setup

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

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SETUP OBJECT MANAGER

Visa slot

Edit Visa slot Custom Field

Passport Number

Have feedback on lookup filters? Comment on IdeaExchange Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Passport Number

Field Name: Passport_Number

Description:

Help Text:

Data Owner: User

Field Usage: --None--

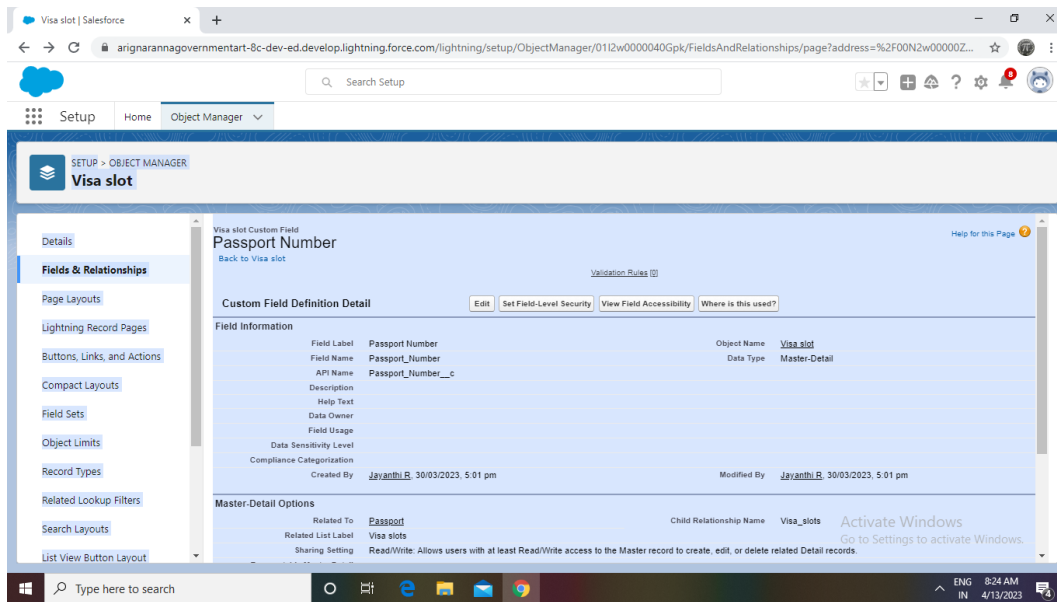
Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR

Chosen:

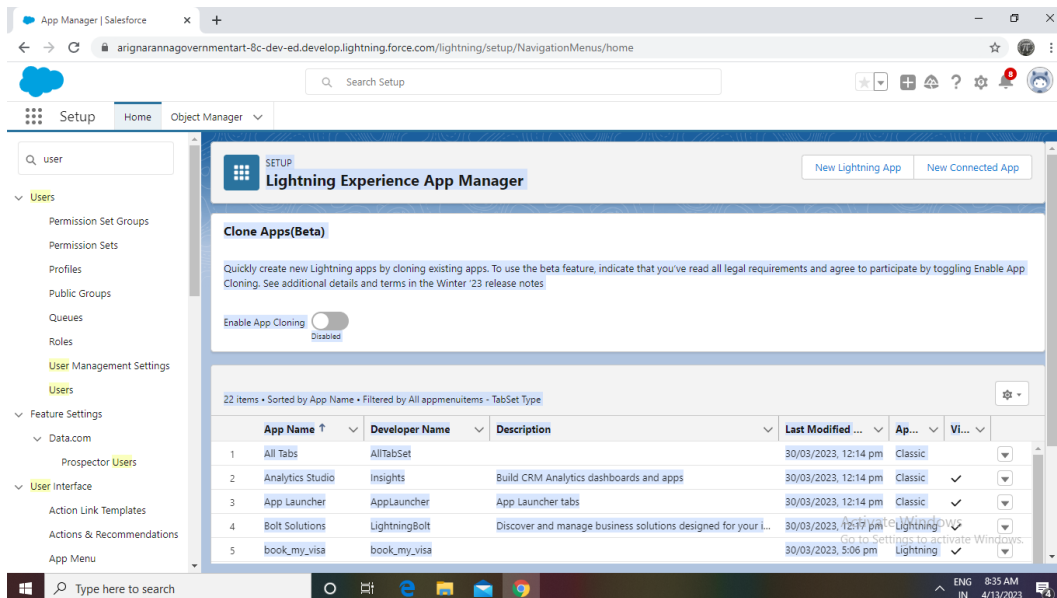
Activate Windows
Go to Settings to activate Windows.



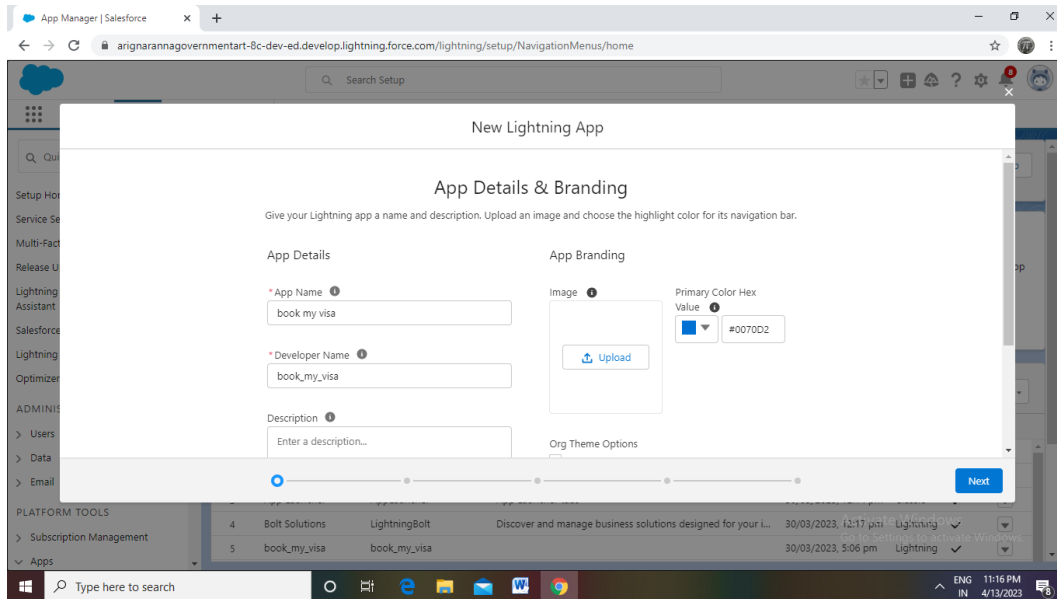
Milestone-4 App:

Activity: Creation of App

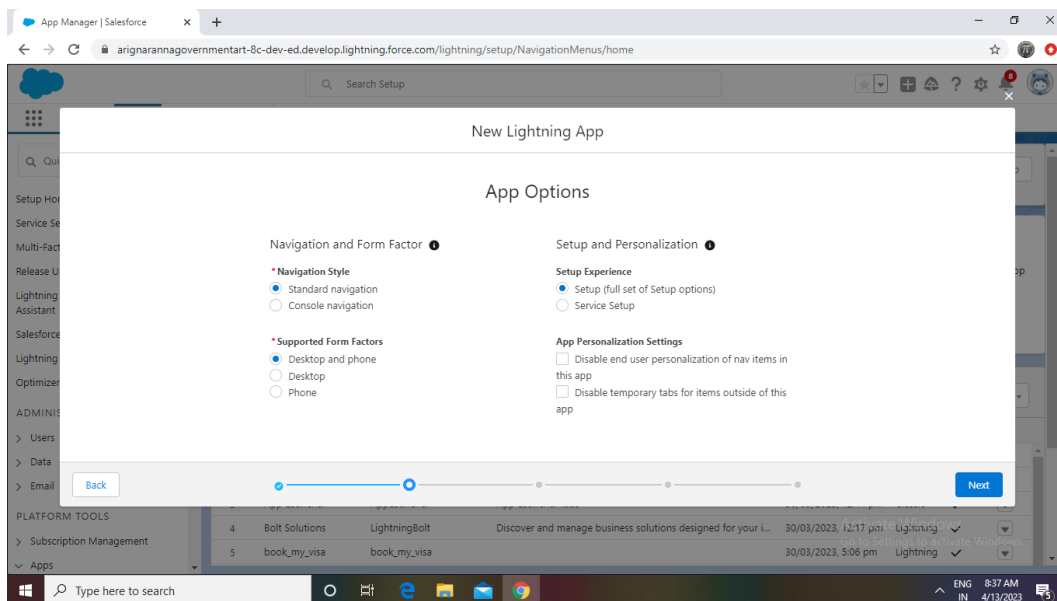
Step 1



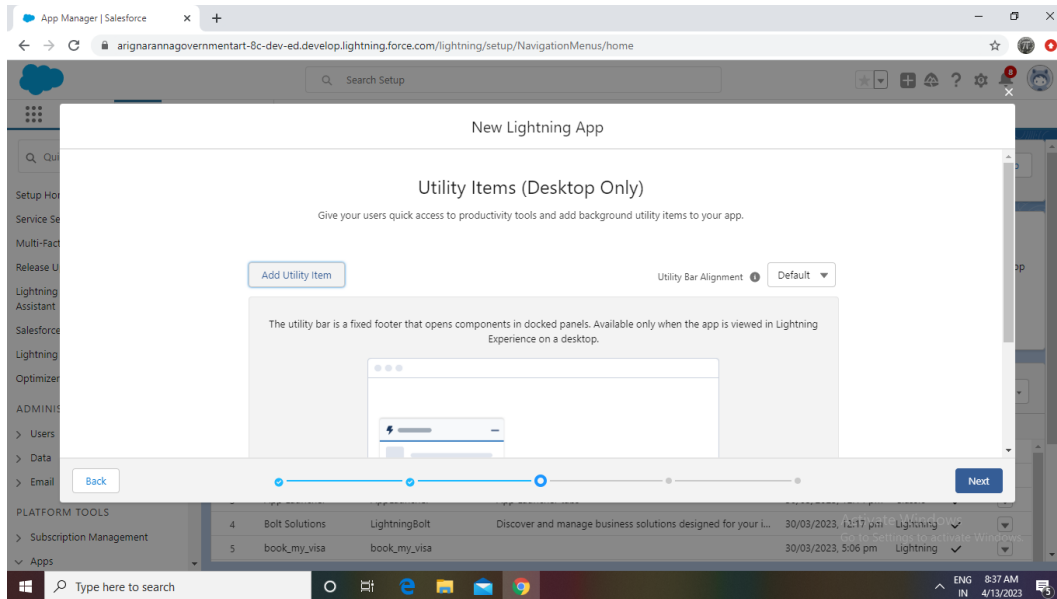
Step 2



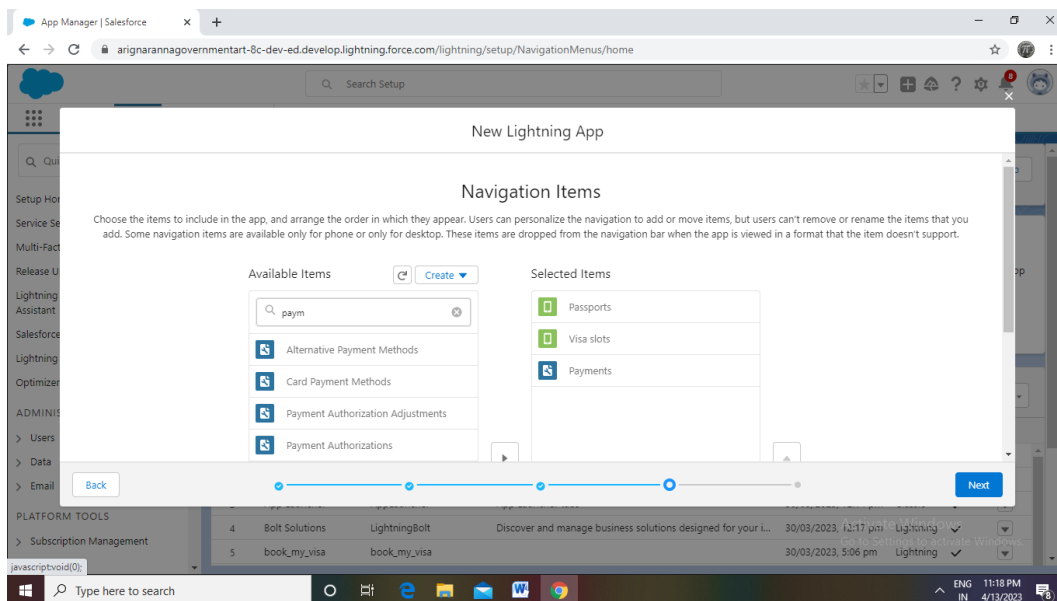
Step 3



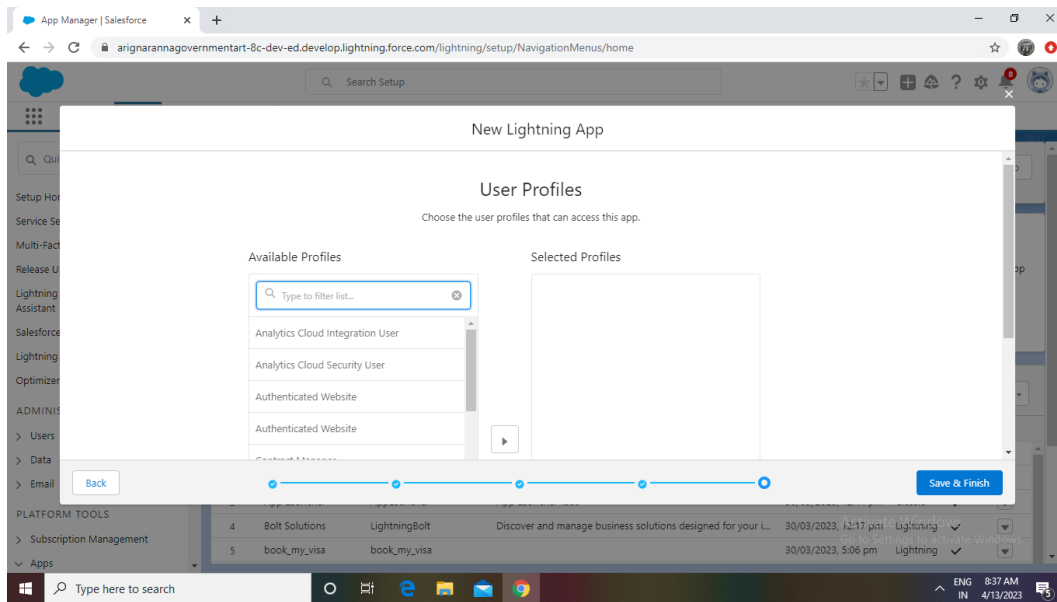
Step 4



Step 5

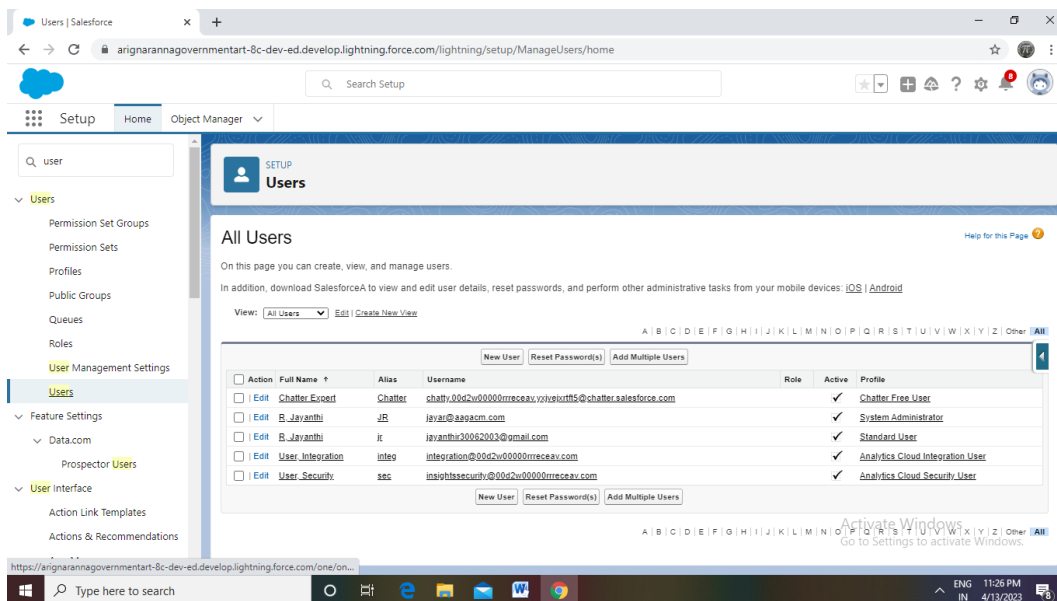


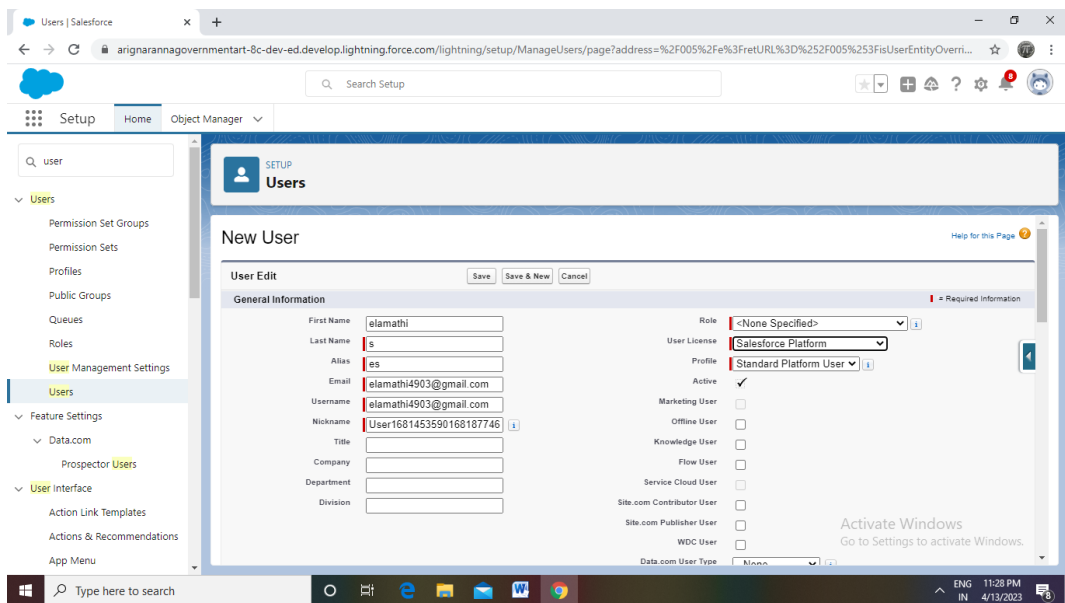
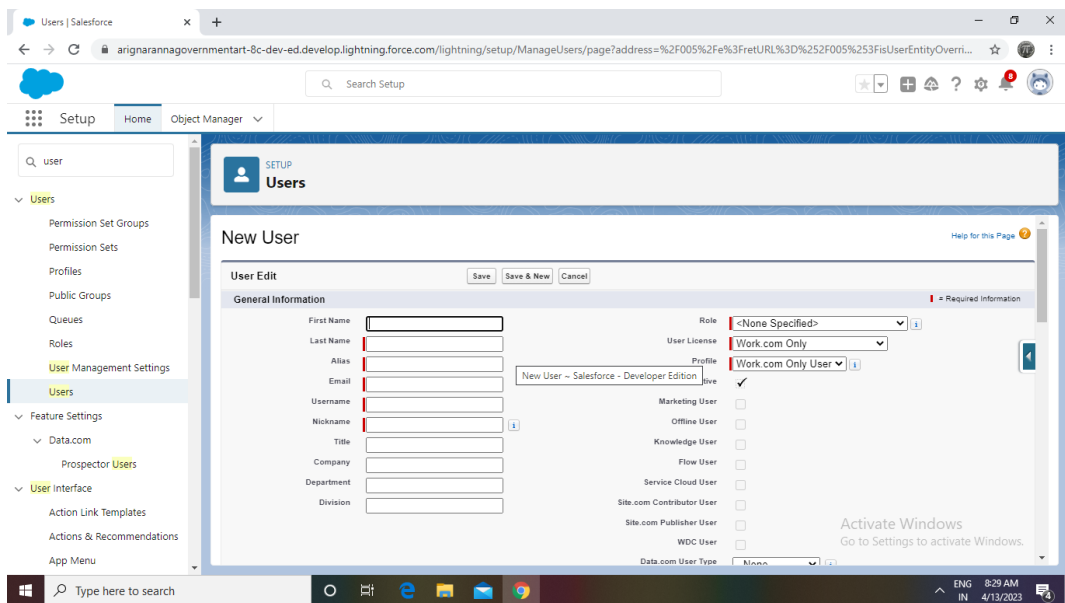
Step 6



Milestone 5 : User:

Activity : 1





Activity 2

The screenshot shows the Salesforce Sharing Settings page. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, and Queues. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown set to 'All Objects'. Below this is a 'Default Sharing Settings' section with a table of 'Organization-Wide Defaults'.

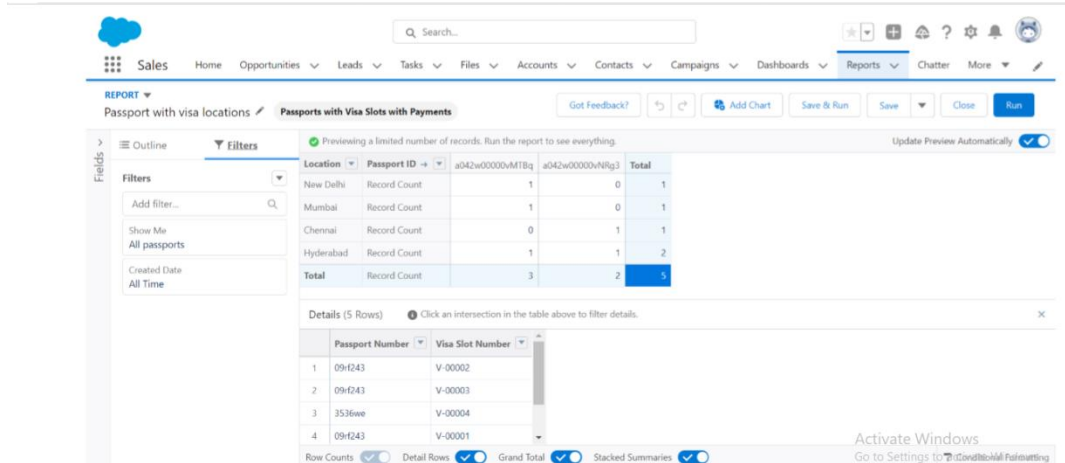
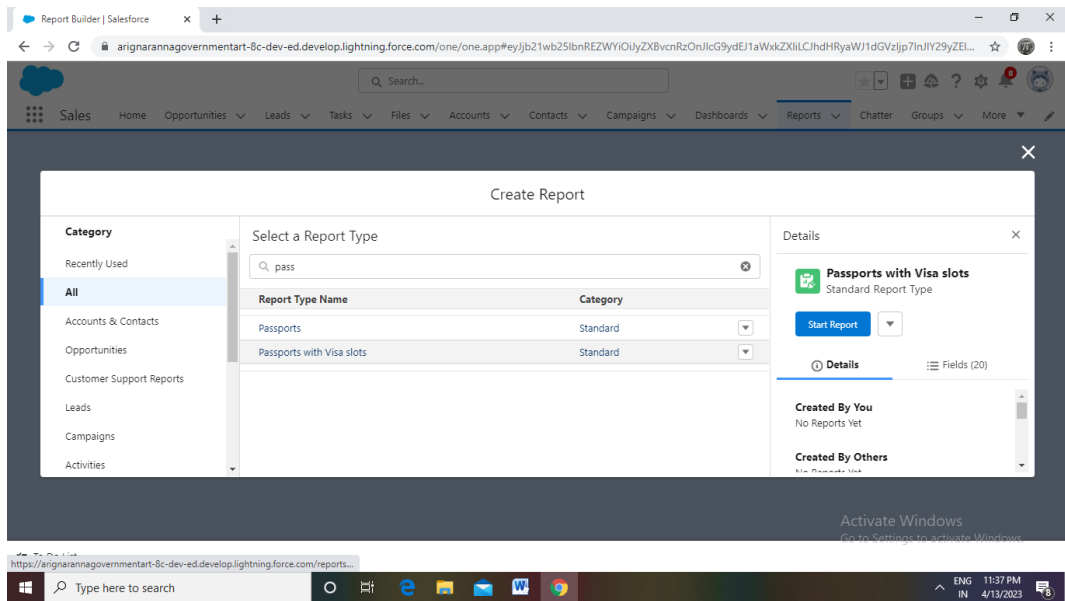
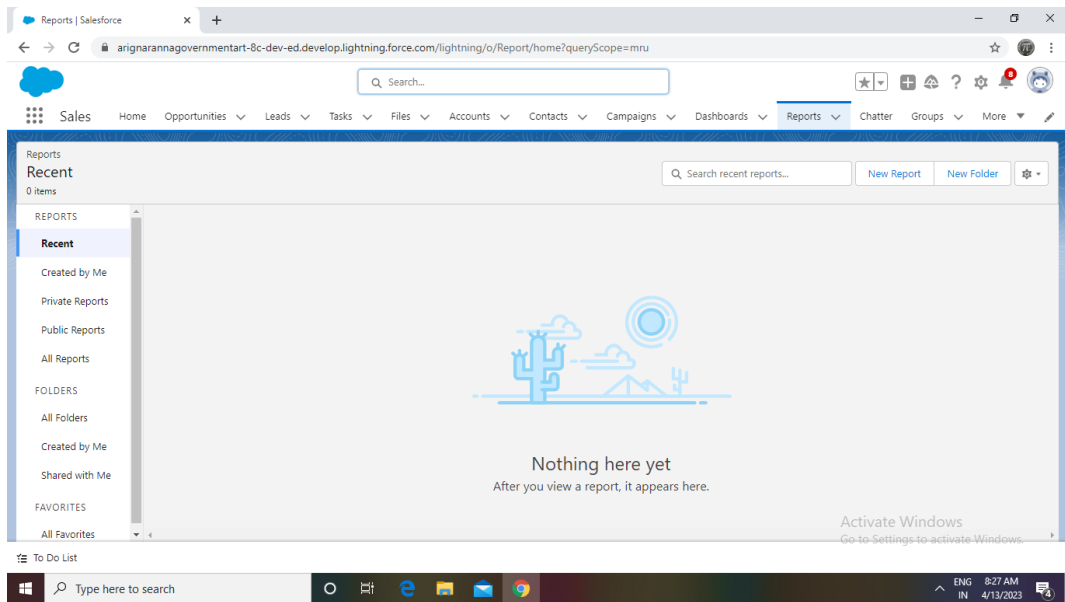
| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|----------------------------|-------------------------|--------------------------------|
| Lead | Public Read/Write/Transfer | Private | ✓ |
| Account and Contract | Public Read/Write | Private | ✓ |
| Contact | Controlled by Parent | Controlled by Parent | ✓ |
| Order | Controlled by Parent | Controlled by Parent | ✓ |
| Asset | Controlled by Parent | Controlled by Parent | ✓ |
| Opportunity | Public Read/Write | Private | ✓ |
| Case | Public Read/Write/Transfer | Private | ✓ |
| Campaign | Public Full Access | Private | ✓ |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | ✓ |

The screenshot shows the Salesforce Sharing Settings page, specifically the 'Other Settings' and 'Sharing Rules' sections. The 'Other Settings' section includes checkboxes for 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. The 'Sharing Rules' section is divided into 'Lead Sharing Rules' and 'Account Sharing Rules', both of which currently show 'No sharing rules specified'.

Milestone-6 Reports:

Activity

Creation of report



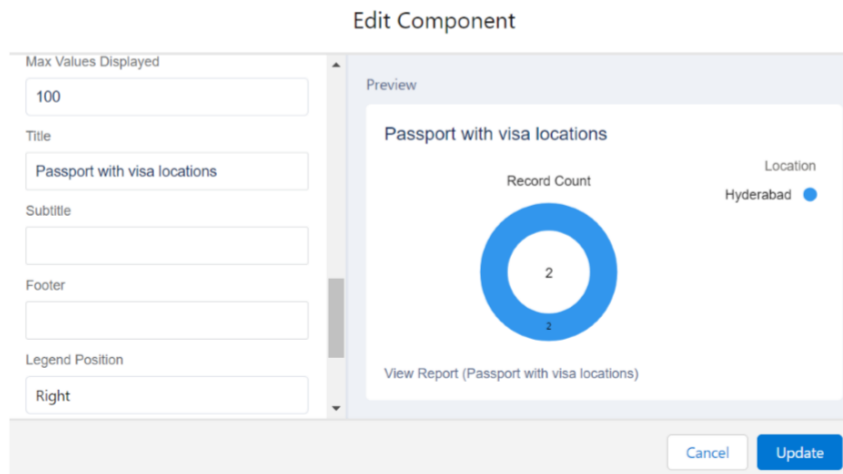
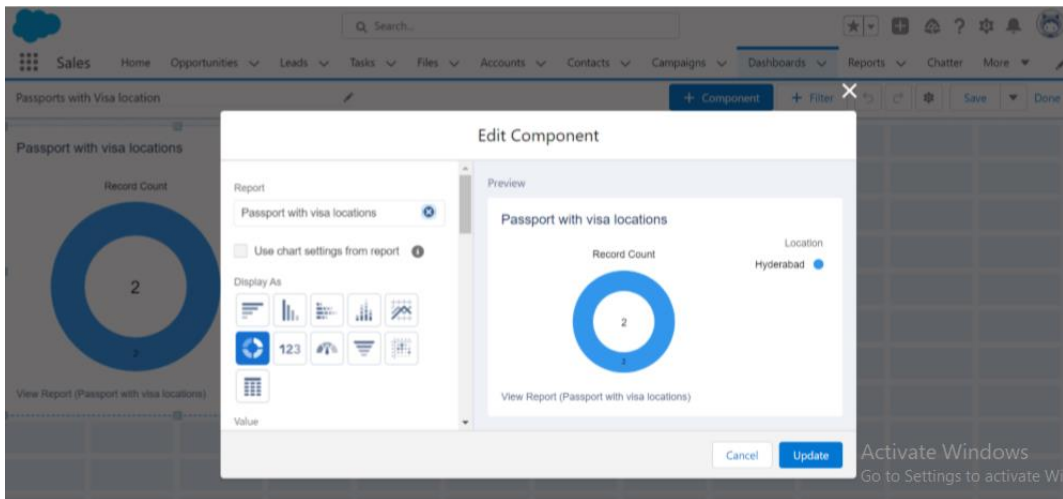
Milestone-7 : Dashboards:

Activity

Creation of Dashboard

The first screenshot shows the Salesforce 'Dashboards' page. The left sidebar contains a 'Recent' section with a search bar and buttons for 'New Dashboard' and 'New Folder'. The main area displays a message: 'Nothing here yet. After you view a dashboard, it appears here.' The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The bottom status bar shows the time as 8:28 AM on 4/13/2023.

The second screenshot shows the 'New Dashboard' dialog box. The 'Name' field is filled with 'passport with visa locations'. The 'Description' field is empty. The 'Folder' dropdown is set to 'Private Dashboards'. The 'Create' button is highlighted. The top navigation bar is the same as in the first screenshot. The bottom status bar shows the time as 11:38 PM on 4/13/2023.



4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/elamathi2003>

Team Member 1 - <https://trailblazer.me/id/jahnj2>

Team Member 2 - <https://trailblazer.me/id/jayanthi2003>

Team Member 3 – <https://trailblazer.me/id/karts102>

5 ADVANTAGES & DISADVANTAGE

List of advantages and disadvantages of the proposed solution

| ADVANTAGES | DISADVANTAGE |
|---|---|
| Improved information Organization | CRM costs. One of the greatest challenges to CRM implementation is cost |
| CRM for Enhanced communication. CRM improves your customer service. Automation of Everyday Tasks. | Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation |
| Greater efficiency for multiple teams | Poor communication |
| Improved Analytical Data and Reporting | Lack of leadership |

6 APPLICATIONS

Businesses of all sizes, from solo freelancers to enterprise-level corporations, can use CRM technology effectively. After all, the key functions of a CRM are organization, centralized task management, marketing automation, and communication, which are important to every business success.

7 CONCLUSION

The Customer Relationship Management has simplified the handling of customers in many industries.

Therefore, after few years CRM will be the important and better process for customer management.

8 FUTURE SCOPE

The future of CRM is about which companies will be able to pivot to meet the changing needs and trends-driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.